SAP Workflow Workshop OM220

Slide 1

Notes:

Welcome to the Project BEACON *SAP Workflow Workshop* training. This course is designed for individuals working at state agencies who support the workflow approval process. In this course, you will learn how to perform the following tasks:

- Review Workflow Items in Inbox
- Use Standard Workflow Tools
- Approve Workflow Items

Prerequisites

- Prerequisites for all:
    - BEACON Overview, BC100
    - SAP Basic Navigation, BC110

- If you are an initiator, you need to take the following courses in your area (OM or PA):
    - Organizational Management Overview, OM200
    - Organizational Management for Agencies, OM210
    - Personnel Administration Overview, PA200
    - Personnel Administration Terms Concepts and Display Data, PA210
    - Create and Maintain Employee Data, PA 310

- If you are a budget approver, you need to take:
    - Agency Funding Approval OM250

Slide 2

Notes:

These are the prerequisites that you must take before attending this class. Attending these prerequisites ensures that you are adequately prepared to learn the new processes, concepts, and data entry skills that are covered in this course.

SAP Training — Welcome and Introductions

- Welcome to SAP Workflow for Agencies course.

    – Introductions
    – Sign-in sheet
    – Tent cards
    – Restrooms
    – Breaks
    – Parking lot
    – Classroom etiquette
        - Cell phones off
        - No side conversations

Slide 3

Notes:

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

- Student Guide
- Other resources
    - Online help
    - Simulations
    - Work instructions
    - Job Aids

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References (Job Aids)

In addition to the Student Guide these quick references are available:
- How to Access the Inbox
- How to Check the Status of a Request
- OM SAP Routing Table
- PA SAP Routing Table

These references are also available online through the BEACON University web site.

The position and job data presented in this course is "real" data. However, the position action scenarios and exercises included in the course simulations have been created solely for the purpose of training.

Other resources

BEACON Online help:
- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

Your Training Responsibilities

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- Attend the applicable training class
- Be actively involved and participate in training
- Practice after training
- Take the Level 2 skills assessment

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Notes:

This course, as is true with all of the HR courses, is not designed for your specific Division or Agency procedures and policies. The training does not include all of the scenarios you encounter in your current job role. Instead, this cross application course (OM & PA) is designed with two purposes in mind:

- To give you the basic knowledge and skills you need in order to perform your tasks in the SAP application as well as to perform any related business processes

- To demonstrate how you can further develop your skills by using the classroom materials, BPPs and Online Help. Practice sessions are available to help continue your SAP education after training is completed.

As you can see, you play an active role in your training development. The BEACON SAP training is designed to ensure that you have the information you need in order to perform your duties and responsibilities.

The Parking Lot

Parking Lot

- Ideas to be covered at a later time

- Items for follow-up outside of class

- Interesting ideas or topics that you may not be able to apply right away due to some barrier (to be discussed at the end of the program)

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Notes:

The *Parking Lot* will be used to record any concerns, expectations, and questions that cannot be answered during the class. If needed, your instructors will follow up with answers to questions that could not be answered in class.

When you think of a concern, ask the instructor. If the instructor/navigator cannot answer the question, it will be forwarded to the BEACON Training office. The Training Solutions Center will contact the subject matter experts to determine an answer and will notify the instructor of the answer.

The instructor will share the answer if it is received before the end of class. vpIf an expectation or concern cannot be addressed in class, the instructor will place it on a parking lot, research it, and provide the class with a response at a later date.

Course Map

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Display the OM Workflow Process

Lesson 3: Display the PA Workflow Process

Lesson 4: Access and Navigate the Workflow Inbox

Course Review

Slide 7

This course has four lesson modules.

Notes:

Course Objective

- Upon completion of this course, you should be able to:

    – Understand the concept of Workflow for supporting OM and PA Actions in SAP
    – Explain the Workflow Process
    – Identify Key Differences in the routing of Workflow Items (PCRs) in OM and PA
    – Access, navigate and complete items within the Workflow Inbox
    – Use Key Features in Workflow to manage OM/PA Workflow Items, such as Log, Tracker, and Header.

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Notes:

Course Map

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North Carolina
Office of the State Controller

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Display the OM Workflow Process

Lesson 3: Display the PA Workflow Process

Lesson 4: Access and Navigate the Workflow Inbox

Course Review

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This course has four lesson modules.

Notes:

Lesson 1 Objectives

- Upon completion of this lesson, you should be able to:

  – Explain the Purpose of Workflow
  – Define key terms you will need while executing the Workflow Process
  – Key Changes with SAP Workflow
  – Display the OM Workflow Process
  – Display the PA Workflow Process

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Notes:

Purpose of Workflow

- To replicate the electronic forms for processing Personnel Actions (PD105) and Position Actions (PD118) in PMIS
- To provide users the ability to create, track and approve workflow items to support employee and position actions in SAP
- To obtain the required Division, Agency, Funding, OSP and OSBM approvals

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Notes:

Key Terms

- <u>Action</u> - a change or group of changes against a position or employee to execute a business process
  - Actions are routed to the appropriate approver using the OM/PA Workflow routing tables.

- <u>OM Routing Table</u> - a custom table created for the State of North Carolina within SAP to hold the list of actions/reasons and logic to support the OM approval process of Position Actions

- <u>PA Routing Table</u> - a custom table created for the State of North Carolina within SAP to hold the list of actions/reasons and logic to support the PA approval process of Personnel Actions

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Notes:

Key Terms…Con't

- <u>Documents</u> - SAP messages that denote the final, completed or rejected status of a workflow item

- <u>Priority</u> - a setting, within the Business Workplace Inbox transaction (SBWP), that indicates the urgency of the workflow item based on the business requirement

- By default, all workflow items are set to 5 (Medium)

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<u>Notes:</u>

Key Terms…Con't

- <u>Workflow Tracker</u> - document that contains the name of the Step, Status, Result, Time & Agent for each workflow item
  - The Workflow Log answers the question, "Who has the workflow item in his/her inbox?".

- <u>Workflow Header</u> - top portion of the Workflow Tracker document that contains a display view of the data used in the workflow item
  - The Workflow Header answers this question, "What data was used to execute this workflow item?".

- <u>Workflow Log</u> – more detailed view of the individual steps the document goes through within the workflow process (detailed Workflow Tracker)

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Notes:

PCR Number

- <u>PCR Number</u> - Personnel Change Requests are objects created to store OM and PA workflow items. These containers are used as references in each workflow item and are referred across all workflow related tables.

  – Workflow items that are generated in Organizational Management (OM) start with a 5 number series (5000000000).
  – Workflow items that are generated in the Personnel Administration (PA) start with a 1 number series (1000000000).

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Notes:

Currently BEACON is only using Personnel Change Request forms within the workflow environment. In the future BEACON may implement additional approval workflow processes (not to include, but as an example, Vendor Invoice approvals, Purchase Order approvals, etc.). These additional workflow processes would use a term other than PCR.

Key Changes in the SAP Workflow Process

- New Positions - The Fund Position and Establish Position actions are combined into one process.

- It is no longer necessary to have OSBM approve the funding of a position prior to establishing the position as the OSBM approval is now a step in the New Position Action workflow process.

- For OM actions, the Agency Funding Approval (Budget Approval) occurs as the first approval after initiation, rather than the last approval in the process.

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NOTE: The Funding Approval by OSBM is not a required step in the Create New Position process for temporary positions.

Notes:

Key Changes in the SAP Workflow Process

- For PA actions, the Agency Funding Approval is last (as is true today). The actual processing of the PA action in the system, however, does not occur until all approvals have been obtained.

- With the SAP system, we have the ability to create Word, Excel and Notepad attachments.

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Notes:

Organizational Management (OM) Workflow Process Flow


```
┌──────────────────────┐          ┌──────────────────────┐
│   Agency HR          │          │  Division/Agency HR  │
│   Professional       │          │  Approval (s)        │
│   Initiates Action   │          │                      │
└──────────┬───────────┘          └──────────┬───────────┘
           │                                 │
           ▼                                 ▼
┌──────────────────────┐          ┌──────────────────────┐
│ Position is created in│          │  OSP Approval        │
│ Planned Status in SAP │          │  (as needed)         │
└──────────┬───────────┘          └──────────┬───────────┘
           │                                 │
           ▼                                 ▼
┌──────────────────────┐          ┌──────────────────────┐
│ Salary Control Officer│         │ Processing completed │
│ Reviews/Approves     │          │ by BEST Shared Services│
│ (Funding Information │          │                      │
│ Is  Entered)         │          │ Position is now      │
└──────────┬───────────┘          │ Active in SAP        │
           │                      └──────────┬───────────┘
           ▼                                 │
┌──────────────────────┐                     ▼
│   OSBM               │          ┌──────────────────────┐
│   Review/Approval    │          │ Record of the Action │
│                      │          │ Is Provided to       │
└──────────────────────┘          │ Salary Control System│
                                  │ via Interface        │
                                  └──────────────────────┘
```

Note:
If at any point in the process the action is rejected, Salary Control is not affected and the position status will be changed to "Rejected" in SAP.

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Notes:

Personnel Administration (PA) Workflow Process Flow

Agency HR Professional Creates Personnel Action Request in SAP → Division/Agency HR Approval(s) → HR Professional routes to OSP for Approval (as required) → OSP Approval (as required) → Salary Control Officer Reviews/Approves (Adjusts Funding as needed) → *HR Initiator Processes the PA40 Transaction in SAP*

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Notes:

The PA action is not complete until the PA40 transaction is processed by the Initiator. The workflow PCR is simply a form to collect some of the basic information for approval purposes and to begin processing the action. When the approval process is complete, the Initiator receives the PCR back in their inbox and they must execute the action from the workflow item and walk through all Infotype screens (SAP will bring you to the appropriate infotypes that require attention for the action). **ONLY** when the PA action has been completely processed should the Initiator mark the PCR workflow item as complete.

If the item is marked complete prior to the action being completely processed in SAP, the Initiator must use transaction code PA40 to re-process the action and attend to every infotype appropriate for that action.

Lesson Review

In this lesson you learned to:
– Explain the Purpose of Workflow
– Define key terms you will need while executing the Workflow Process
– Define Key Changes with SAP Workflow
– Display the OM Workflow Process
– Display the PA Workflow Process

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Notes:

Course Map

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North Carolina
Office of the State Controller

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Display the OM Workflow Process

Lesson 3: Display the PA Workflow Process

Lesson 4: Access and Navigate the Workflow Inbox

Course Review

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Notes:

This course has four lesson modules.

Lesson 2 Objectives

Upon completion of this lesson, you should be able to:

– Discuss the OM Workflow Process Flow for Creation of a New Position
– Use the "planned action" search feature on the Position search function
– Discuss the routing and processing of OM workflow Items
– Create a New Position (with an attachment using the Services for Objects function)
– Complete the OM Workflow Approval Process for the newly Created Position

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Notes:

Look to your agency or OSP for guidance as to when attachments are required.

OM Routing Table

Action	Action Description
100	Create New Position

Approval Process...

Agency Position Funding Approver
Office of State Budget Management (OSBM)
Agency Division Approver (optional)
Agency OM Position Approver
Office of State Personnel (OSP) (if required)
BEST Shared Services

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Notes:

NOTE: Only the New Position OM action requires OSBM Approval.

BEST Shared Services is not an approval level, but rather a process step to complete position actions.

OM Routing Table…Con't

Action	Action Description
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Authorization
107	Reallocate Position Differential
108	Remove Position Differential
109	Abolish Position
113	Position Transfer
115	Position Hours Change
116	Position Employee Group / Subgroup Change

Approval Process…

Agency Position Funding Approver
Agency Division Approver (optional)
Agency OM Position Approver
OSP (if required)
BEST Shared Services

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Notes:

These actions do not require OSBM approval.

BEST Shared Services is not an approval level but rather a process step to complete position actions.

ZOMA069 Initial Position Action Screen

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NOTE: Training on ZOMA069 is provided in the OM210 course.

The Initial Position Action screen requires that all mandatory fields are populated on the selection screen. As the OM Initiator, you will need to enter the mandatory data found below:

Action **Example:** 100

Position **Example:** 59034138

The appropriate effective date value for the position action, the "Valid From" date will serve as the "effective date" of the position action. The "Valid To" date will always default the end date to 12/31/9999.

NOTE: You can type the Position's Object ID or use the SAP standard search functions to find the desired position.

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Click on the "Search Positions in Planned Status" tab to find
positions with existing PCRs.

Slide 27

SAP will populate the information note *"PCR5000000574 saved."*

Document the PCR number for each workflow item to help you keep track of all the items awaiting approval under your user ID.

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The use of the ZOMA069 transaction is included in the *OM210 – Organizational Management for Agencies*.

Notes:

Accessing the Workflow Inbox (SBWP)

SAP Easy Access - User menu for ZUAT46

- Favorites
- User menu for ZUAT46
  - General User Functions
  - Human Resources
  - Information Systems

Click the *SAP Business Workplace* button

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Notes:

As the OM Approver, you will log into your Inbox (SAP Business Workplace, or transaction code SBWP) to view all of the Workflow Items pending approval.
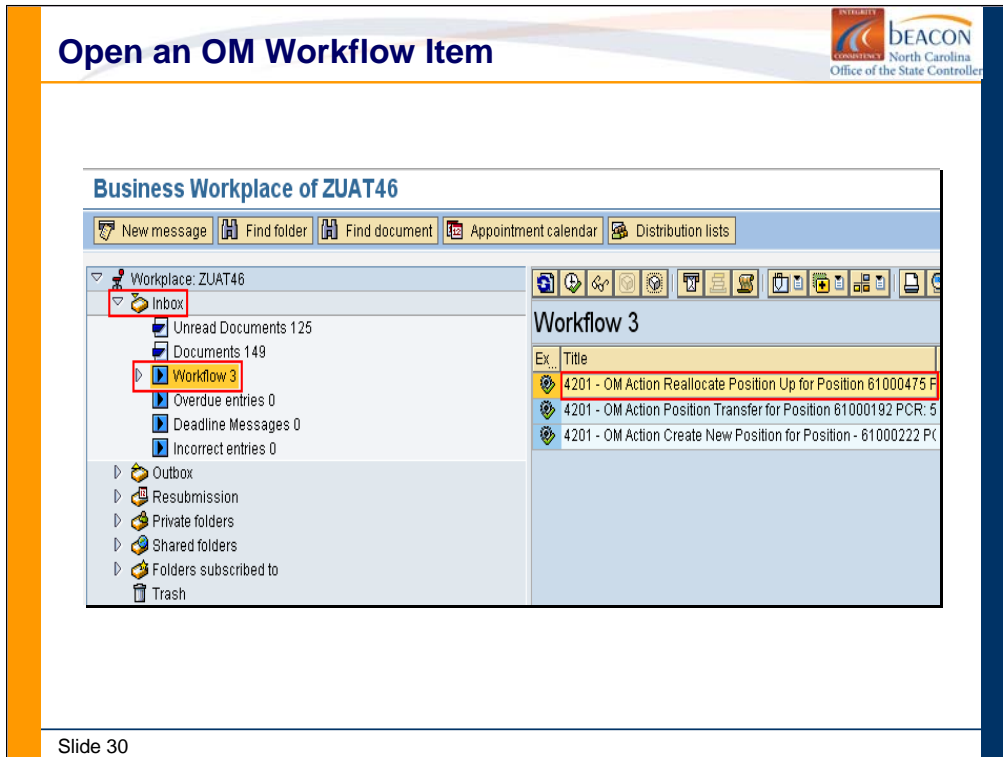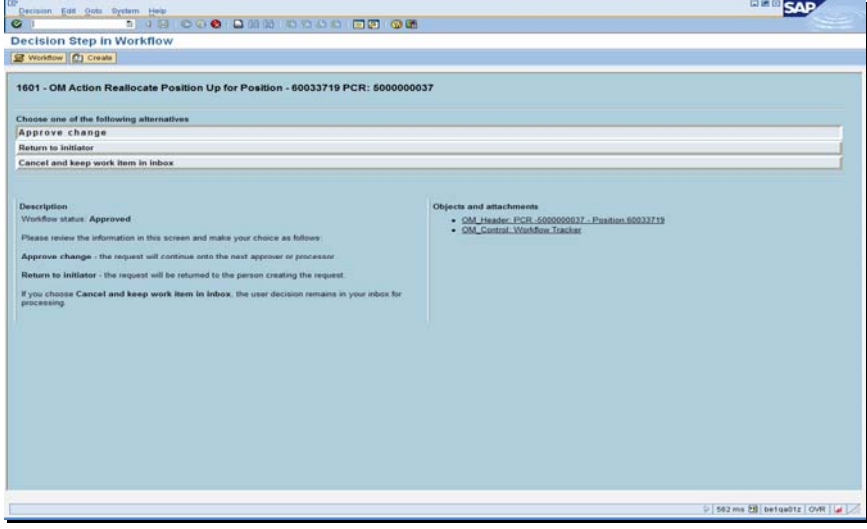
Open an OM Workflow Item

Business Workplace of ZUAT46

Slide 30

Notes:

Steps to enter the SAP Workflow Inbox:

1) Click the Inbox. You will see workflow items sitting in the Workflow folder.

2) Double click on the workflow item to execute it. You can also use the EXECUTE icon (second icon) on the toolbar.

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Notes:

From this screen the approver can Approve, Reject, or Cancel and keep the work item in the Inbox.

NOTE: "Cancel and keep the work item in inbox" simply leaves the item as is and allows the approver to make a decision at a later time.

OM Position Creation Workflow

Department

Meets with Personnel Analyst regarding a position request

The position action is performed and Workflow is initiated

Salary Control Officer

Reviews the request and enters funding information

Are there other approvers?

Yes — Continued on next slide

No

BEST Shared Services

Processes work item / PCR

Workflow sends confirming email to the initiator's Workflow Inbox

NOTE: If position action is rejected, it is sent back to the Initiator.

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All OM position actions are initiated in Workflow.

Roles involved in position actions:

- Agency HR Personnel Analyst researches the action with the appropriate manager.
- Agency HR data entry/personnel analyst uses the ZOMA069 transaction to enter the required position data in planned status and then initiates Workflow for approvals.
- Agency Salary Control Officer (Agency Position Funding Approver) approves the action after entering the cost distribution and position salary or rejects the action.
- The OSBM (Office of State Budget and Management) Position Funding Approver approves or rejects the position action.
- Agency position approver approves or rejects the position action.
- Division position approver approves or rejects the position action.
- The OSP Position approver approves or rejects position action.
- Upon final approval, the action is active in the SAP by BEST Shared Services.

Notes:

OM Position Creation Workflow…Con't

Other approvers

BEST Shared Services

Continued from last slide

HRPA - ISR Approve

SAP Workflow

SAP Workflow

These other approvers either approve or reject the work item /PCR:
• Division Approver
• Agency Approver
• OSBM Funding Approval
• OSP Approval

Workflow sends approved work item, / PCR to BEST Shared Services

Processes work item / PCR

Workflow sends confirming document to Initiator & Approvers

NOTE: If position action is rejected, it is sent back to the Initiator.

Click here for Simulation

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NOTE: The required agency approval levels for each action mirror the legacy process. However, the Create New Position action does not require the funding approval from OSBM (Office of State Budget and Management) if temporary position.

If the workflow item is rejected by any approver it is sent back to the initiator for change and is resubmitted. The process then starts over.

In the final step, a workflow document is sent to the (unread documents folder) inbox of the initiator and approvers.

Notes:

Instructor Demonstration – Simulation #2.1

Create a new Position (with an attachment)

- In this simulation, the Instructor will:
  - Search for OM actions in Planning Status.
  - Create a position, and show the progression of the position through the levels of Approval in Workflow.

- The instructor will use the following BPPs
  - **OM Workflow: Action 100 – Create New Position**
  - **OM Workflow: Funding Approver Inbox**
  - **OM Workflow: Division/Agency Approver Inbox**
  - **OM Workflow: BEST Shared Services Approver Inbox**

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Notes:

Lesson Review

In this lesson, you learned to:

- Discuss the OM Workflow Process Flow for Creation of a New Position
- Use the "planned action" search feature on the Position search function
- Discuss the routing and processing of OM workflow Items
- Create a New Position (with an attachment using the Services for Objects function)
- Complete the OM Workflow Approval Process for the newly Created Position

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Notes:

Course Map

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Display the OM Workflow Process

Lesson 3: Display the PA Workflow Process

Lesson 4: Access and Navigate the Workflow Inbox

Course Review

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This course has four lesson modules.

Notes:

Lesson 3 Objectives

After completing this lesson, you should be able to

– Discuss the PA Workflow Process Flow
– Discuss the Key Differences in the SAP OM/PA Workflow Process
– Complete the PA Workflow Process for Hiring a new Employee (including PCR Number Search)

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Notes:

Key Differences in the SAP OM/PA Workflow Process

- Approval process for Funding is last in PA and first in OM
- PCR number on PA starts with 1 and OM with 5
- The initiator starts the request, sends the workflow item through the approval process, receives the workflow item back, and then executes the employee action.
- In OM, the position information is stored directly on an SAP record in planned status. After approval has been obtained, the system will then change the status from planned to active.
- In PA, the action information is stored in a "holding area" on the PCR only. After approval has been obtained, the user will then execute the action to enter the data in SAP.

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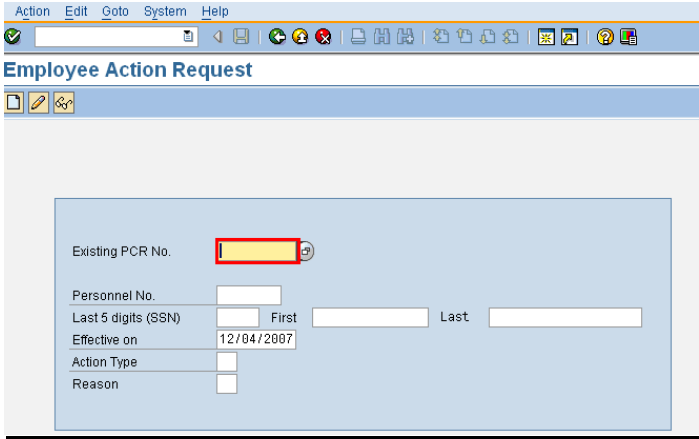
Notes:

The initiator on the PA Action request starts the request, submits the workflow item for approval, then waits for final approval and the request to be returned to their inbox to process the PA Action.

The initiator on the OM Action request starts the request, submits the workflow item for approval, then only receives the workflow item back if it has been rejected at any point in the approval process. The last stage is the BEST Shared Services team for the OM workflow.

PA Initiate:
Insert Employee Action Request Form (ZPAA076)

Employee Action Request

Existing PCR No.

Personnel No.
Last 5 digits (SSN)   First   Last
Effective on   12/04/2007
Action Type
Reason

Click **Create** button.

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Notes:

NOTE: A simulation for the ZPAA076 transaction is provided in the PA310 course.

The Employee Request form requires that all mandatory fields are populated on the selection screen. As the PA Initiator, you will need to enter the mandatory data found below:

Last 4 digits (SSN) (Social Security number) **Example:** 7455

First Name **Example:** Sarah

Last Name **Example:** Johnson

Action Type **Example:** Z0 (Personnel Action)

Reason for action value **Example:** 01 (Identifies the reason for the personnel action)

Important Note: SSN must be valid or the ZHR_Hiring transaction will not work. The transaction code ZHR_HIRING is kicked off by executing the PCR which has been returned to the Initiator after approval. ZHR_HIRING will not work as an independent transaction code in SAP. If the PA Action has not been processed using the workflow item in the Initiator's inbox, use transaction code PA40 to process the remaining infotypes of the action.

PA PCR Number Search

You can type the PCR Number or use the SAP standard search functions to find the desired personnel number (employee).   It is not necessary to type in a PCR# when creating a new action. Use this PCR search (located on the BEACON Help site in the Workflow folder) when you are looking for an existing PCR.

Notes:

• How_to_Locate_a_PCR

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Notes:

A simulation for the ZPAA076 transaction is provided in the PA310 course.

Update the following **required** fields:

EE Position (eight-digit position code for the position to be maintained)

• Example: 59034138

If performing a Quick Entry of a contractor who will not be paid through SAP, do not enter the salary. Leave as the default 000s.

Annual Salary: (Numeric value for the employee salary amount)
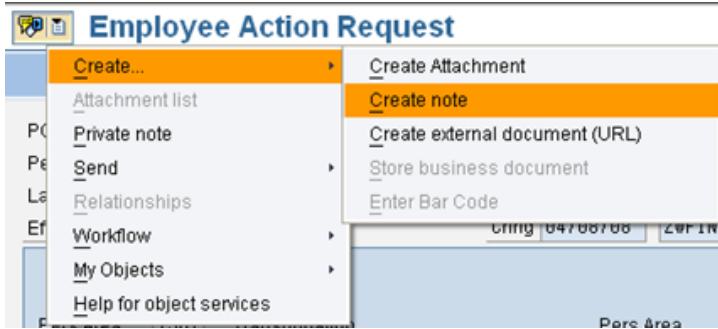
• Example: 20,000.00

Important Note: Enter Employee position first and press Enter. The information defaults. You can then change the fields as necessary.

Attaching Comments in Workflow

To add comments to a record:

- Click the Services for Object icon

- Choose the attachment option needed

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Attaching comments in Workflow

Select the Services for Object icon.

- Two options
  - Right side -Tabular in form
  - Left side – Graphical
  - Same functions, no difference
- Choose from the following attachments:
  - Attachment
  - Note
  - URL link (website)
- Add title and notes
- Click the green check mark and save to add notes to record.

Note: "Private note" is only available on your user ID, it will not be viewable by others.
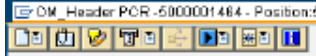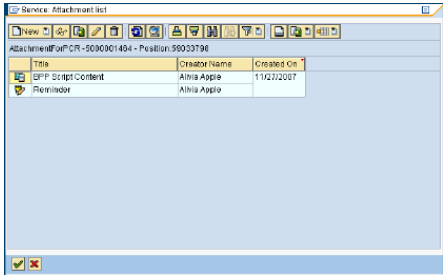
Viewing Comments (Attachments) in Workflow

To view comments attached to a record:

- Click the Services for Object icon (graphical view)

- Choose the attachment option needed

- View the list of attachments

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Notes:

View comments in Workflow

- Select the Services for Object icon.
  - Choose graphical option.

- Choose the attachments icon (the one with the paper clip)

- View the list of attachments saved to this record.

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Notes:

SAP will populate the information note *PCR1000000574 saved.*
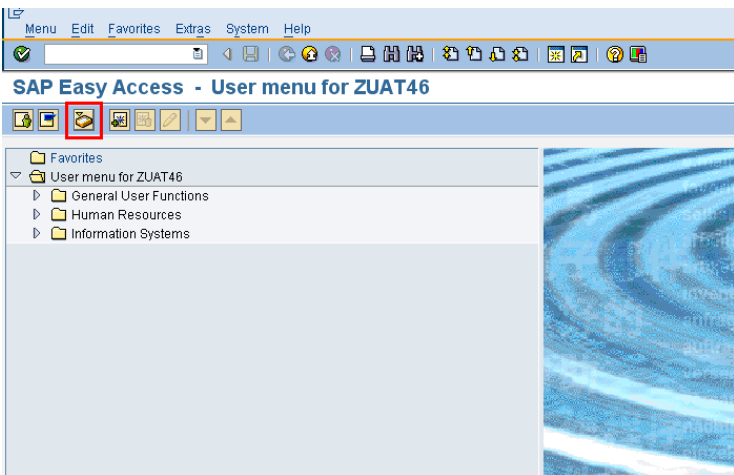
Document the PCR number for each workflow item to help you keep track of all the items awaiting approval under your user ID.

For more information on attaching comments, access BEACON Help and locate the following BPP in the Workflow folder:

- Services for Objects – attaching notes, docs, URLs

Click the *SAP Business Workplace* button.

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Notes:

You will access your inbox to locate approved PA PCRs awaiting processing (through the PA40 transaction).
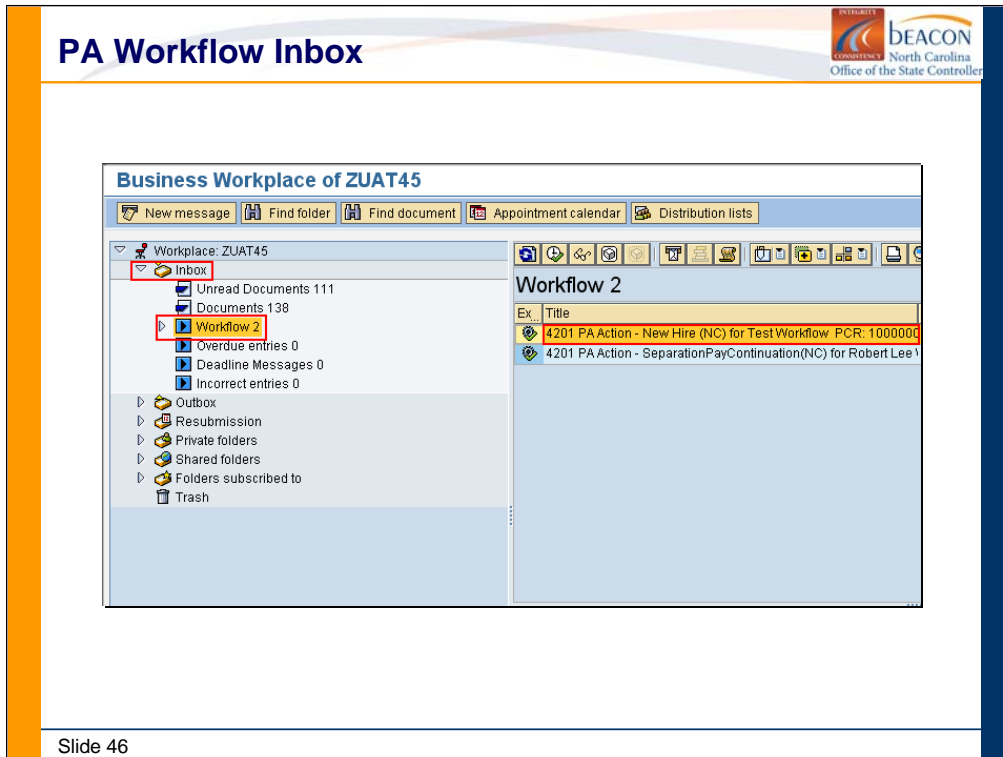
PA Workflow Inbox

Business Workplace of ZUAT45

New message | Find folder | Find document | Appointment calendar | Distribution lists

Workplace: ZUAT45
▽ Inbox
  Unread Documents 111
  Documents 138
▷ ▶ Workflow 2
  ▶ Overdue entries 0
  Deadline Messages 0
  ▶ Incorrect entries 0
▷ Outbox
▷ Resubmission
▷ Private folders
▷ Shared folders
▷ Folders subscribed to
  Trash

Workflow 2

Ex	Title
	4201 PA Action - New Hire (NC) for Test Workflow PCR: 1000000
	4201 PA Action - SeparationPayContinuation(NC) for Robert Lee

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Notes:

Steps to enter the SAP Workflow Inbox:

1) Click the Inbox. You will see workflow items sitting in the Workflow folder.

2) Double click on the workflow item to execute it. You can also use the EXECUTE icon (second icon) on the toolbar.

Instructor Simulation #3.1

Hire a New Employee

- In this simulation, the instructor will hire a new employee and show the progression of the New Hire through the levels of Approval in PA Workflow. The instructor will use the following BPPs:

  – PA Workflow: Initiate New Hire Action
  – PA Workflow: Approving a PCR Work Item (Division/Agency/OSP)
  – PA Workflow: Funding Approver Inbox
  – PA Workflow: Complete New Hire Action

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Notes:

Lesson Review

In this lesson, you learned to:

- – Discuss the PA Workflow Process Flow
- – Complete the PA Workflow Process for Hiring a new Employee (including PCR Number Search)

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Notes:

Course Map

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Display the OM Workflow Process

Lesson 3: Display the PA Workflow Process

Lesson 4: Access and Navigate the Workflow Inbox

Course Review

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Notes:

This course has four lesson modules.

Accessing the Workflow Inbox (SBWP)

Click the **SAP Business Workplace** button

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Folders in the Inbox

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Documents are SAP Messages that are created and read similar to the email process (*Outlook*, *Lotus Notes*, etc.).

Documents are separated by 2 folders here:

- **(Unread) Documents** - Documents that have not already been read
- **Documents** - Documents that are new and read.

Workflow: This folder will hold all the SAP Work Items that arrive for the User to Execute to perform some type of action within the SAP system.

The following folders are not in use: **Overdue entries**, **Deadline Messages**, and **Incorrect entries**.

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Notes:
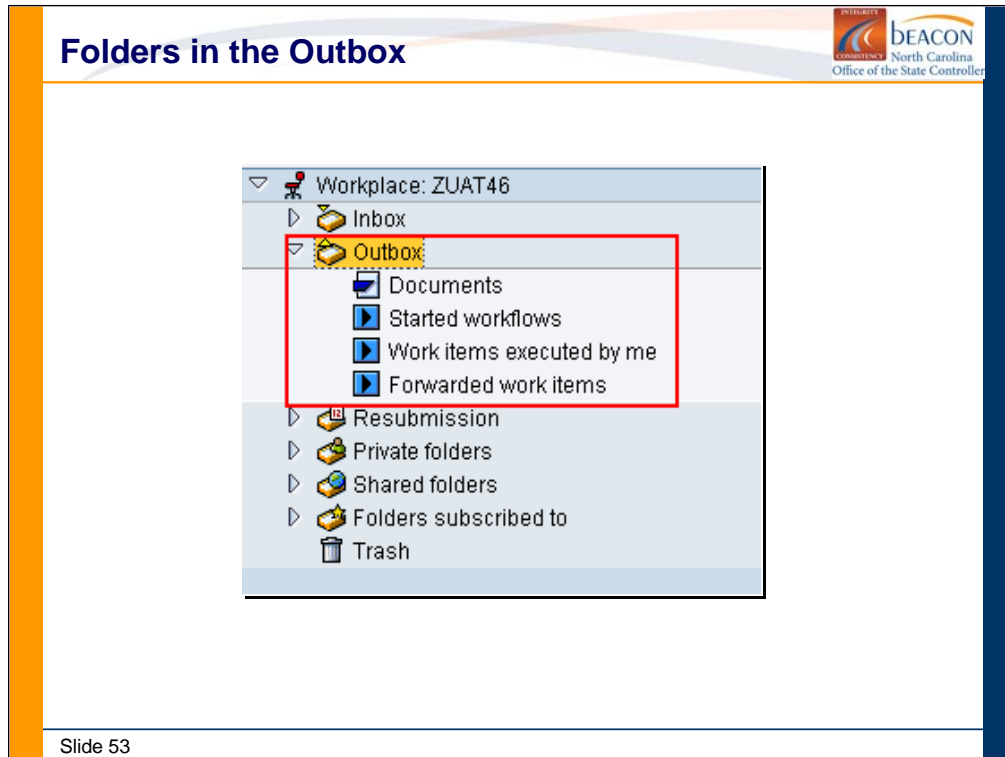
OUTBOX: The Workplace Outbox lists all the Workflows started and the work items forwarded and executed by the User.

- **Started Workflows**: This view shows the Work Items for the tasks started by this User.
- **Work items executed by me**: This view shows all the Work Items that have been executed by the User, such as approvals.

The **Forwarded work items** folder is <u>not</u> in use:

Workflow Status

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Office of the State Controller

- **Possible statuses for a work item are:**
  - *Ready*
  - *Reserved*
  - *In process*
  - *Executed*
  - *Completed*

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The **Status** will show if the Step has been Completed is Ready or is In Process by a User.

More information on Workflow Status:

Ready: The work item is released for execution and displays in the Workflow inbox of all recipients.

Reserved: The work item has been reserved by a recipient and is transferred from the status Ready. It is only displayed in the Workflow inbox of the actual agent and is no longer displayed in the Workflow inboxes of any other recipients. A user reserves an item by double-clicking on it or by highlighting and clicking Execute.

In Process: A work item assumes this status if:

1) It is being executed by the actual agent.

2) The work item is waiting for its terminating event.

3) Execution is terminated by the actual agent.

4) Execution has been terminated with a temporary exception for which no subsequent steps have been modeled.

In this status, the Workflow system has not yet recognized the point at which processing is completed. As long as the work item's status remains *in process*, database changes have not been made.

Executed: This work item is awaiting a specific confirmation of its completion which is required. A work item with *executed* status can be executed or forwarded several times until it is set to status *done* in the Business Workplace.

Completed: The execution of the work item is completed and is no longer displayed in the Workflow inbox of the Business Workplace. This means that the PA or OM action is complete.
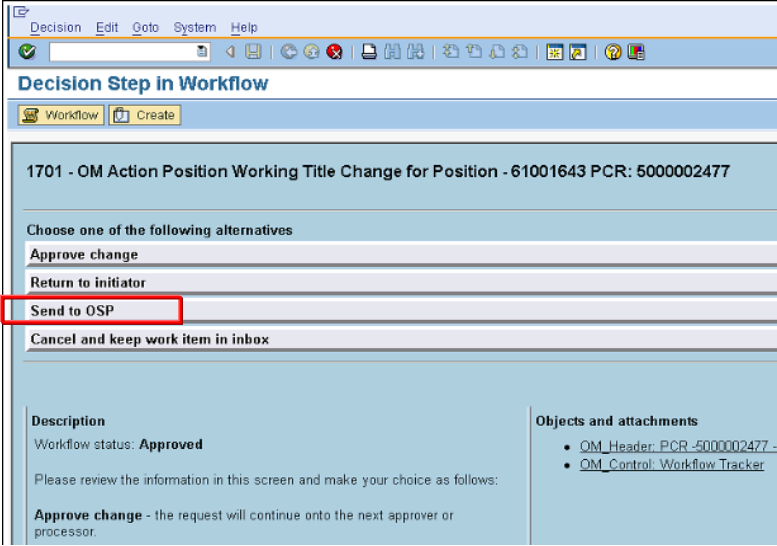
Slide 55

Notes:

- Once you initiate Workflow, the status is updated to "N" for in process.

- Once an approver approves the action, the status is set to "A" for approved and will remain at "A" for all approval levels unless an approver rejects an action.

- When an approver rejects an action the status is changed to "R" for rejected.

- Once the BEST Shared Services processes the approved action, the status is changed to "M" for completed.

- If the initiator accepts the rejection of an action, he or she will change the Workflow status to "C" for canceled.

- When BEST Shared Services processes the canceled action (this changes any OM changes in planned status to rejected status) the status will be changed to "M" for completed.

Routing to OSP

Decision Step in Workflow

1701 - OM Action Position Working Title Change for Position - 61001643 PCR: 5000002477

Choose one of the following alternatives

Approve change

Return to initiator

Send to OSP

Cancel and keep work item in inbox

Description
Workflow status: **Approved**

Please review the information in this screen and make your choice as follows:

Approve change - the request will continue onto the next approver or processor.

Objects and attachments
- OM_Header: PCR -5000002477 -
- OM_Control: Workflow Tracker

This tab is only available to view on the "Agency Approver's" screen.

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Notes:

IMPORTANT NOTE: Direct routing to OSP is no longer available. The approver must click the Send to OSP button.

Workflow Status - Reject

Once you select Return to Initiator, the workflow item will leave your inbox and will be routed back to the initiator where he/she can perform the following functions:

- Change and Resubmit (make a change and restart the workflow process for the workflow item)
- Cancel OM/PA Action (stop and cancel workflow for the workflow item)
- Cancel and Leave in inbox (leave in the Initiator's inbox for future processing)

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Notes:

Workflow Status - Reject

Click the **Return to initiator** `Return to initiator` button.

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Notes:

If an item is rejected, the approver is prompted to enter a rejection reason in a comments screen (not the Services for Objects field).
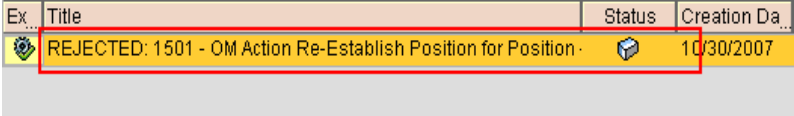
Slide 59

Notes:

After rejecting the position request, the approver is able to add comments to communicate with the initiator regarding the reason for rejection.

This is not Services for Objects comment field.

Workflow Status - Rejected

Ex	Title	Status	Creation Da
🏵	REJECTED: 1501 - OM Action Re-Establish Position for Position ·	📦	10/30/2007

Once an Approver Rejects the Item, a Workflow Item is sent to the Initiator's Inbox with a Rejected Status.

Slide 60

You can view the workflow tracker to see at what level of approval it was rejected as well as the reasons for the rejection in the attached note.

The PCR isn't rejected until you complete the comments. The rejected item will not be visible to the initiator and the Approver will have an approver comments in his/her inbox until the comments are completed.

Notes:

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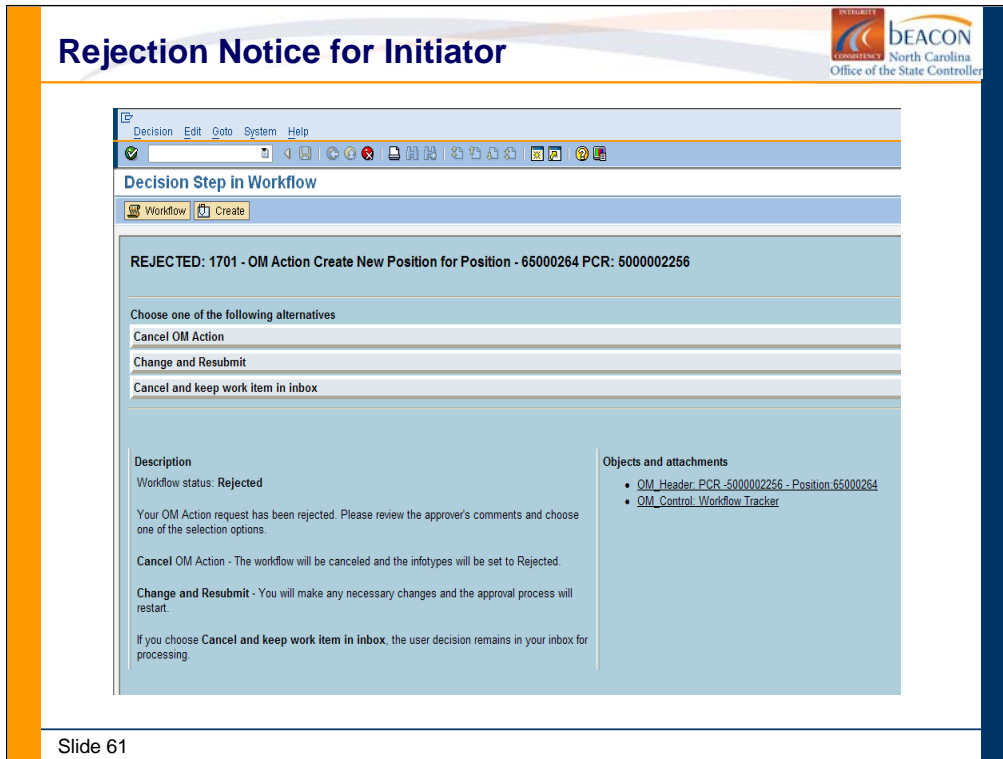
This is the screen the initiator sees. From here the initiator may choose to cancel or change and resubmit.

The following actions may be taken:
- Cancel OM Action
- Change and Resubmit
- Cancel and keep work item in inbox
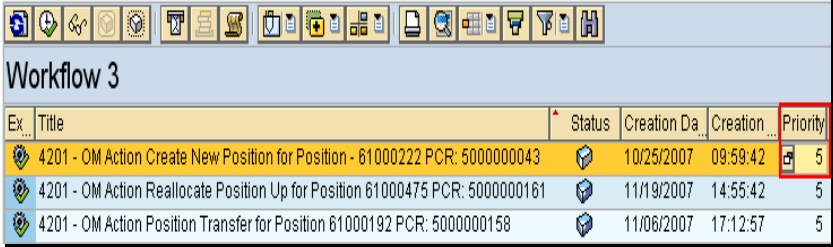
Notes:

Priority Levels in the Inbox

Priority – A setting, within the Business Workplace Inbox transaction (SBWP), that indicates the urgency of the workflow item based on the business requirement.

Priorities are global settings and are denoted with a color ledger.

Workflow 3

Ex	Title	Status	Creation Da	Creation	Priority
	4201 - OM Action Create New Position for Position - 61000222 PCR: 5000000043		10/25/2007	09:59:42	5
	4201 - OM Action Reallocate Position Up for Position 61000475 PCR: 5000000161		11/19/2007	14:55:42	5
	4201 - OM Action Position Transfer for Position 61000192 PCR: 5000000158		11/06/2007	17:12:57	5

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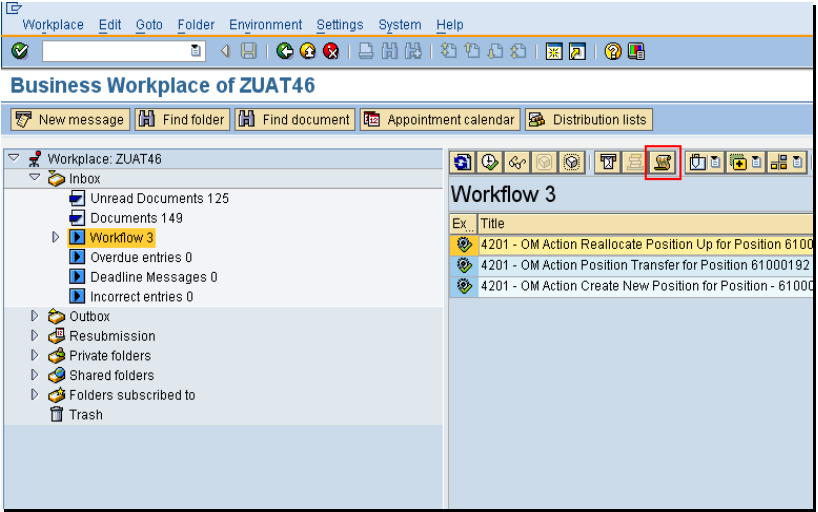
Notes:

Priorities may only be set if the item is currently in your inbox.

See the Business Workplace Button Functions Job Aid on BEACON Help for more information on setting priorities.

Display and View the Workflow Log

Click the **Log** [icon] button to view the approver who is next in line for the workflow item.

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Notes:

The Workflow Log is a document within workflow that contains the name of the Step, Status, Result, Time & Agent.

- The Workflow Log answers this question, "Who has the workflow item in his/her inbox?".

Display and View the Workflow Log

Click the Agents icon to view the list of names.

Select the Agents you would like to display by clicking the Agents button.

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<u>Notes:</u>

Display and View the Workflow Log

TS 99100056	Edit OM action
US 01231600 US 90000011	ANGELA LISSON ROBERT JEFFERSON

View the Personnel Number and Employee Name.

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Notes:
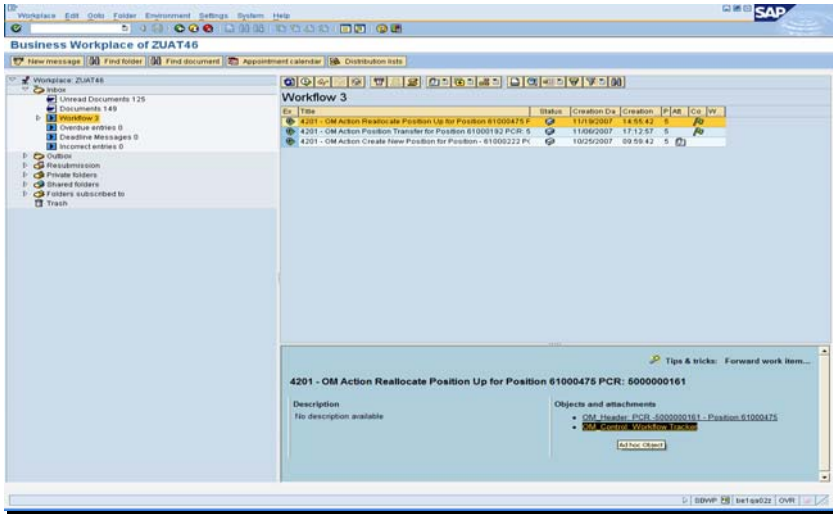
The Workflow Log tells the user that this Work Item is waiting for the Funding Approver to approve the item. There are 2 possible Funding Approvers that can approve this item. (Angela Lisson, and Robert Jefferson)

NOTE: In production SAP will display actual Personnel Numbers and Employee Names.

Display and View the Workflow Tracker

Click the *Workflow Tracker* OM_Control Workflow Tracker Button

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Notes:

View the workflow tracker

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Using the Workflow Tracker, you will see the status of the workflow item and the approvers.

The Header section will list:
1. The Request ID (PRC Number)
2. Status (the overall status of the work item)
3. Action type/Reason (the action and associated reason performed for this work item)
4. Agency (Personnel area assigned to the position during the action)
5. Org Unit (The Organizational unit ID and description)
6. Creator (User who executed this workflow item)
7. Org Unit (The Organizational unit ID and description)
8. Employee (The Position ID and description of the position related to this work item)
9. Position (The Position ID and description held by the Employee)

The detail portion will list these attributes:
1. Sequence (line item sequence)
2. Role represents the approver relationship
   FA1-Funding Approver, DA1 Division Approver, AA1-Agency Approver, SOM-Shared Services OM Processer
3. Mandatory indicates whether this approver is mandatory. X confirms that the approval of the approver is required.
4. Ptype is used to signify the Processor (P) and Approvers (A)
5. Agent ID represents the Personnel number of the Approver
6. Name/Description lists the name of the Employee
7. Act/Desc holds on value (P) Processed to indicate who processes the action
8. Cmnt will indicate if a rejection note has been created for the action. To see comment, highlight the line and click the Notes icon (the one with the eyeglasses.
9. Actual/Name represents the Personnel number and name of the Initiator

Notes:

Display and Use the Workflow Header

Ex	Title	Status	Creation Da	Creation	P	Att	Co	W
	4201 - OM Action Reallocate Position Up for Position 61000475 P		11/19/2007	14:55:42	5			
	4201 - OM Action Position Transfer for Position 61000192 PCR: 5		11/06/2007	17:12:57	5			
	4201 - OM Action Create New Position for Position - 61000222 PC		10/25/2007	09:59:42	5			

Tips & tricks: Forward work

4201 - OM Action Reallocate Position Up for Position 61000475 PCR: 5000000161

Description
No description available

Objects and attachments
- OM_Header: PCR -5000000161 - Position:61000475

Click on the *Workflow Header* OM_Header PCR button

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Notes:

Display and Use the Workflow Header…Con't

Review the data provided on the workflow item

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Notes:

Lesson Review

In this lesson, you learned to use the SAP Business Workplace *to:*

- – Access Workflow Inbox in transaction code SBWP
- – Review and discuss the different Folders in Inbox (Unread Documents, Documents, Workflow)
- – Review and discuss the different Folders in Outbox (Started Workflows, Work Items Executed by Me)
- – Explain the different possible statuses for a Workflow Item (Ready, Executed, Reserved, Rejected, Completed)
- – Discuss the different priority levels that can be set in the Inbox
- – Show in Process Workflow Items
- – Open a Workflow Item
- – Display the Workflow Log
- – Display the Workflow Tracker
- – Display the Workflow Header

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Notes:

Course Map

beacon
North Carolina
Office of the State Controller

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Display the OM Workflow Process

Lesson 3: Display the PA Workflow Process

Lesson 4: Access and Navigate the Workflow Inbox

Course Review

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This course has four lesson modules.

Notes:

Course Objectives

In this course you learned to:
- Understand the concept of Workflow for supporting OM and PA Actions in SAP
- Explain the Workflow Process
- Identify Key Differences in the routing of Workflow Items (PCRs) in OM and PA
- Access, Navigate and Complete items within the Workflow Inbox
- Use Key Features in Workflow to manage OM/PA Workflow Items, such as Log, Tracker, and Header.

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Notes:

Questions

PARKING LOT

?

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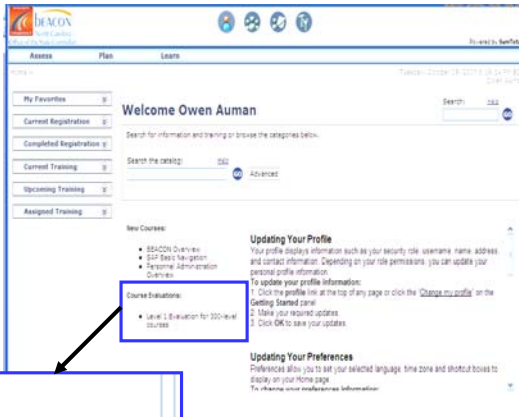
Notes:

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Level 1 Evaluations

The Level 1 evaluation for 100 and 200 level classes will continue to be accessed as directed in previous instructions (**Learner Home Page > Learn > Evaluations**).

Notes:

Level 2 – Course Assessment
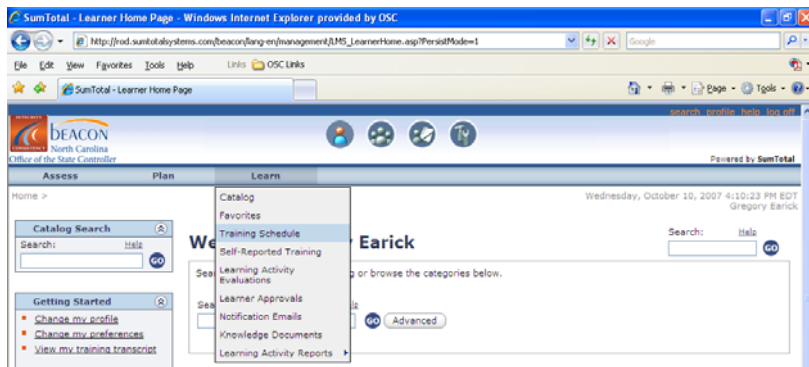
Access the Level 2 Assessment from the Core Users link on the BEACON University website.

– Level 2 assessments will have the corresponding course set as a prerequisite, so the curious user will not be able to launch the assessment before completing the class.

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The assessment is listed on a learner's Training Schedule. The Training Schedule can be accessed from the Learner Home Page within the Core Users section of the BEACON University. Follow the menu path *Learn* > *Training Schedule* as shown above.

Continue to the next slide for additional instructions on how to access the Level 2 Assessment.

Launch the assessment by clicking on the green arrow icon next to its title in the table. The assessment will open in a new window, similar to the web-based training courses.

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Notes:

All Level 2 assessments will be titled with the course code followed by "Evaluation Level 2" so that they may be easily distinguished from the actual class listed in the schedule.

Depending on their security settings, the learner may be asked to allow an Active X component to run.

After selecting an answer for each question, click once on the Score my Quiz button at the bottom of the screen. The user will receive feedback for each answer they have chosen and a statement of the number of correct answers.

A dialogue box asking learners to choose to open or save the file ContentAdaptor.asp may display for learners with moderately restrictive security settings. Learners should click the Cancel button on the dialogue box. This will not interfere with the learner's score and completion status being sent to the LMS.

Learners should close the assessment window by clicking the X in the upper right hand corner. After returning to the LMS window, the LMS will load a page that reflects the user's score and completion status. Learners may click the OK button at the bottom of the screen to return to their Training Schedule or they can click the Log Off link in the upper-right corner of the screen to leave the LMS.

Next Steps

- Monitor BEACON communication
- Review conceptual materials
- Access BEACON help
  – Access from an SAP transaction
  – Access on line at http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
  – URL: https://mybeacon.nc.gov
  – Client 899
  – Use your current NCID user name and password
- Schedule Practice Sessions
  – Transition Centers
  – Schedule a practice session

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Notes:

Continue to monitor updates on the BEACON University website for information regarding the project and future training that you are scheduled to attend.

Review your student guide to ensure you are ready for go live. Keep the materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. You will be denied access to other training clients, so ensure you enter the correct client number before attempting to log on for your practice session. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

SAP Workflow Workshop Appendix

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Notes:

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Notes:

Transaction code **S_AHR_61016493** - Organizational Structure

This report is used to generate an Organizational Plan view of the approvers supporting the workflow process.

The business requirement is to display all of the approvers for a given segment of the organizational structure.

As a reminder, OM approvers are identified by having a relationship created between their position and the Organizational unit. The Organizational unit represents a segment of the structure that approvers will be responsible for managing within the workflow process.

Positions will not necessarily be approvers within their own organizational unit. They may be responsible for a larger grouping of organizational units. As a result, a relationship between their position and the highest organizational unit within that area will be created and inherit responsibility for all organizational units within the hierarchy.

Users of this report could be:

Position Action and Employee Action Initiators

Approvers (Agency Approvers, Division Approvers, OSP, OSBM)

BEST Shared Services

BEACON Production Support Team

Display the Organizational Structure Report

Organizational Structure

Organizational Unit
Search Term

Reporting period
○ Today   ◉ All
○ Current month ○ Past   Key date
○ Current Year   ○ Future   Other period

Status   All existing

☑ Standard Selection Screen

Click **"Standard Selection Screen"**   ☐ Standard Selection Screen
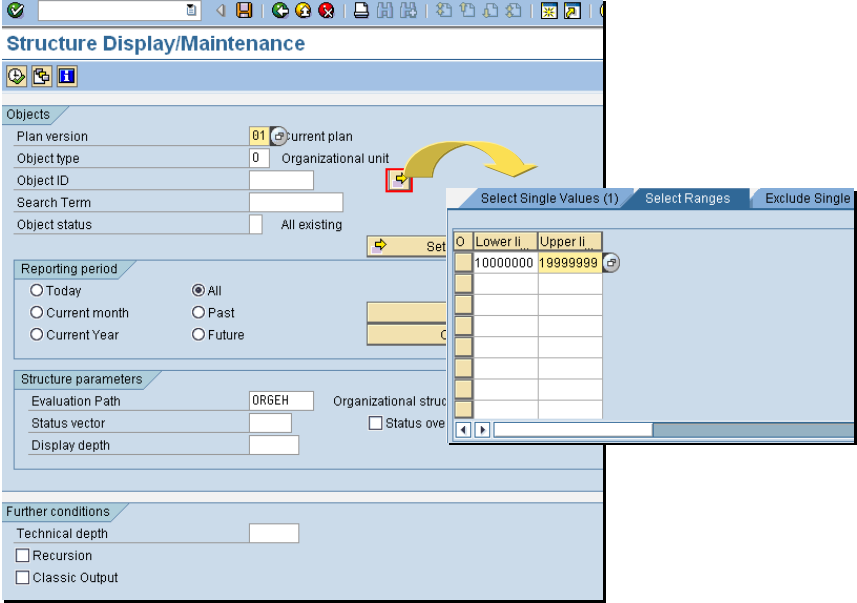
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Notes:

Users will select the **Standard Selection Screen to Enter** additional selection criterions for executing the report.

The Standard Selection Screen allows you to access additional report parameters that you may wish to use for this report. Normally, you can run this report by not selecting this indicator. However, we will run this report using an evaluation path specifically created for reporting on Workflow relationships.

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Notes:

Click the *Multiple selection* button

Select a range of organizational units

Note "10000000 to 19999999" will include all Org Units

You may also select only one Org unit, if you are looking for approvers for that particular report.
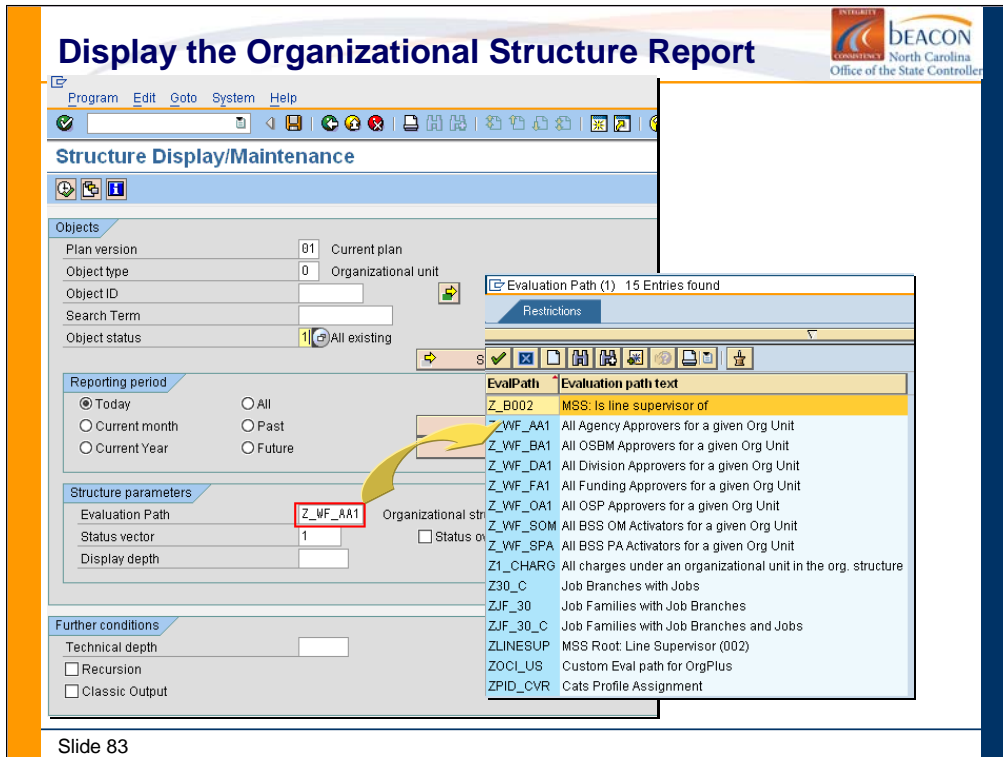
Notes:

Remove the Object Type "O". We do not want to conduct a search based on the Object Type "O" for Organizational unit. We want to search for all of the "Z" evaluation paths. The evaluation path will evaluate the necessary object types and their corresponding relationships.

Remember that an Evaluation Path is a mechanism used to report on Object Types via the grouping of relationship in Organizational Management (OM).

OM is object-oriented and therefore requires the use of relationships and evaluation paths (to report on those relationships).

Here are the OM Workflow Evaluation paths:

- Z_WF_AA1   Agency Approvers for a Organizational unit structure
- Z_WF_BA1   OSBM Approvers for a Organizational unit structure
- Z_WF_DA1   Division Approvers for a Organizational unit structure
- Z_WF_FA1   Funding Approvers for a Organizational unit structure
- Z_WF_OA1 OSP Approvers for a Organizational unit structure
- Z_WF_SOM BEST Shared Services processes for a Organizational unit structure responsible for OM Position Actions
- Z_WF_SPA   BEST Shared Services processes for a Organizational unit structure responsible for PA Employee Actions

Select the "Z" evaluation path of your choosing.

Click **Execute**.

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SAP will display the list of all of the selected Organizational units and their Approver Positions.